

CITY OF SANTEE
REQUEST FOR PROPOSALS



Department of Development Services

**Land Management System (LMS) and
Implementation Services**

RFP Issued | September 10, 2021
RFP | CIP 2021–50

Public Bid Opening | No

Proposals Due | Thursday, October 7, 2021 • 5:00 p.m. PDT

City of Santee
10601 Magnolia Avenue • Santee, CA 92071
(619) 258-4100
www.CityofSanteeCA.gov



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**CITY OF SANTEE
REQUEST FOR PROPOSALS
LAND MANAGEMENT SYSTEM
SEPTEMBER 10, 2021**

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1. RFP Overview

1.1 Purpose of RFP

The City of Santee, hereinafter referred to as “City”, is seeking proposals from qualified software vendors to provide land use management, permitting, and code compliance/case management workflow automation. The City seeks a qualified firm (Proposer) with the experience, expertise, and qualifications to provide a fully integrated, proven state-of-the-art solution. The City will also be looking to partner with the selected vendor to provide the associated professional services to complete implementation.

To be considered, companies must have five (5) years of experience with developing and implementing such software for cities with a population between 50,000 and 100,000 and submit a complete proposal by the stated deadline.

The City is interested in a solution that provides all the functionality identified below by a single proposer. Detailed requirements are included in APPENDIX B, LMS Requirements. At a **minimum**, the proposed solution should include the following integrated functionality and features:

- Planning
- Permitting
- Code Enforcement / Complaint Tracking
- Inspections (including building, planning, code enforcement, fire)
- Business Licenses
- GIS Integration
- Robust Inquiry and Reporting
- Online Portal (including public inquiries)
- Mobility
- Automated Workflow
- Document Management and CMS Integration

In addition to the software functionality identified above, the City is seeking a Proposer to provide professional services that will ensure a successful implementation. The professional services should include the following:

- Project Management
- Software Installation and Configuration
- Business Process Review and Redesign
- Implementation Consulting
- Data Conversion Services
- Acceptance Testing Support
- Training
- Documentation
- Report Writing
- Software Maintenance and Post-Implementation Support

The City will consider and evaluate both on-premises solutions and Software-as-a-Service (SaaS) implementation models. Proposers are also encouraged to offer alternatives to the

traditional license purchase approach. If alternatives are offered, the Proposer should clearly identify what is being offered and the pricing to allow the City to fully evaluate the offering as compared to the traditional licensing approach.

Proposing vendors should be aware that, due to City requirements and related resource constraints, the implementation of the selected solution must be completed by December 1, 2022. The City is prepared to have the necessary resources assigned and available to the project to meet this firm deadline, and **vendors are required to propose a project implementation schedule that enables the City to do so**, and to plan accordingly.

1.2 RFP Timeline

Table 1, RFP Schedule of Events, identifies the RFP schedule that will be followed; note that dates are subject to change.

Table 1 – RFP Schedule of Events

RFP EVENT	DATE/TIME
City Issues RFP	September 10, 2021
Deadline for Proposer Questions	September 17, 2021
City Responses to All Questions	September 24, 2021
Deadline for Proposal Submission	Thursday, October 7, 2021 – 5:00 PM
City Completes Evaluations	October 29, 2021
Finalist(s) Notified & Proof of Capabilities (POC) Packet Provided	Week of November 15, 2021
POC (Proof of Capabilities) Sessions	Week of December 6, 2021
Due Diligence	December 2021
Notify Selected Vendor / Begin Contract Negotiations	December 2021
City Council Approval	January 2022
Project Kickoff	TBD

Proposers should be aware that finalist(s) will be required to participate in a minimum of two (2) days of scripted Proof of Capabilities (POC) sessions to allow staff to fully understand the proposed solution. The sessions will be attended by City subject matter experts, will focus on the functions deemed most critical to the City and will consist of vendors working through scenarios provided by the City.

The POC is not intended to be a generic demonstration of the application. Rather, it is designed to address specific product functionality concerns of the City. Proposers must be prepared to invest the time and resources necessary to complete a successful POC and be considered for final selection.

Note: A determination will be made closer to the scheduled date of the POCs as to whether these sessions will be scheduled for onsite or remote delivery; the City will work with the selected vendor(s) to ensure the safety and well-being of all participants in light of the on-going COVID-19 pandemic, however vendors hoping to be successful in securing this contract must ensure their teams' availability during the targeted period.

Please note the City might also request that Proposers clarify the capabilities of their solutions through follow-up conversations, emails or limited remote demonstrations of solution

functionality (i.e., GoToMeeting/WebEx) prior to formal invitation to participate in the POC and selection.

The City reserves the right, at its sole discretion, to adjust this schedule as it deems necessary.

1.3 RFP Coordinator

All communications concerning this RFP must be submitted via email to the RFP Coordinator identified below. The RFP Coordinator will be the sole point of contact for this RFP.

Doug Thomsen, AICP – Senior Planner

10601 Magnolia Avenue – Building 4
Santee, CA 92071-1222

Email: DThomsen@CityofSanteeCa.gov

Proposers contact with anyone else in the City is expressly forbidden and may result in disqualification of the Proposer's bid.

1.4 Proposal Preparation Costs

The City will not pay any costs associated with the preparation, submittal, or presentation of any proposal.

1.5 RFP Amendment and Cancellation

The City reserves the unilateral right to amend this RFP in writing at any time. The City also reserves the right to cancel or reissue the RFP at its sole discretion. If an amendment is issued, it will be posted to the City's procurement website, under the section titled ***Requests for Bids and Proposals***. Proposers bear responsibility for monitoring the City's procurement website for any related procurement updates and will need to respond to the final written RFP and any exhibits, attachments, and amendments.

1.6 Questions Pertaining to the RFP

Specific questions concerning the RFP should be submitted via e-mail to the RFP Coordinator (See RFP Section 1.3 RFP Coordinator) no later than the "Deadline for Proposer Questions" as identified in Table 1, RFP Schedule of Events. Proposer questions should clearly identify the relevant section of the RFP and page number(s) related to the question being asked.

Copies of all questions and the City's responses will be posted to the City's procurement website.

1.7 Proposal Submittal

Proposals must be submitted no later than the "Deadline for Proposal Submission" as identified in Table 1, RFP Schedule of Events. Proposers assume the risk of the method of delivery chosen. The City assumes no responsibility for delays caused by any delivery service. A Proposer's failure to submit a proposal as required before the deadline may cause the proposal to be disqualified.

Proposers must submit in a sealed package:

- ♦ One (1) original, signed master RFP response, including the Pricing Response

- ♦ Nine (9) printed copies of the RFP Response
- ♦ Six (6) printed copies of the Pricing Response under separate cover
- ♦ One (1) printed, redacted copy of the RFP Response for public requests for information, this copy should be clearly identified and should NOT contain any proprietary or confidential information
- ♦ Two (2) flash drives containing electronic copies of all files submitted, including:
 - One (1) complete set of documents covering the RFP response
 - One (1) set of documents comprising the redacted RFP response
 - One (1) electronic copy of the Pricing Response in Excel format (**not a PDF copy**)

Proposals must be clearly identified “RFP – CIP 2021-50: Land Management System and Implementation Services” and submitted to:

City of Santee
Office of the City Clerk
10601 Magnolia Avenue – Building 3
Santee, CA 92071-1222

All proposals must be received before the Deadline for Proposal Submission date as indicated in Table 1, RFP Schedule of Events. Proposals received after this time and date may be returned unopened. Postmarks will **not** be accepted as proof of receipt.

1.8 Public Records Law

Pursuant to California Government Code Section 6250, public records may be inspected and examined by anyone desiring to do so, at a reasonable time, under reasonable conditions, and under supervision by the custodian of the public record. All submitted proposals are subject to this code section. See RFP Section 7.18 Proprietary Information regarding proprietary response content.

2. City Overview

The City of Santee incorporated December 1, 1980, with a Council-Manager form of government and with a directly elected mayor. Santee is located eighteen (18) miles east of downtown San Diego and encompasses 16.7 square miles with over 58,000 residents.

The City employs approximately 129 full-time staff members and is responsible for providing a range of municipal services that include fire and life safety services, street maintenance, traffic circulation, planning and community development, park and contracted landscape maintenance, code enforcement, public works, and recreation programs. Contracted services include law enforcement, city attorney, building inspection and animal control. Water and sewer service are provided by Padre Dam Municipal Water District and trash collection services by Waste Management.

Surrounded on three sides by chaparral-covered hills, the city is bisected by the San Diego River. The river forms a linear greenbelt containing parks, trails and more than 1,100 acres of tree-lined riparian habitat. The city's picturesque setting is further enhanced by Mission Trails Regional Park, a 7,220-acre open space reserve that offers a permanent mountain view for Santee's western flank. The city's parks inventory includes Santee Sportsplex USA, a 15-acre sports field complex that hosts regional and national softball, baseball, and soccer tournaments.

Santee has nurtured a vibrant local economy by providing for a balance of retail, commercial and residential uses. The 700-acre Town Center district forms a downtown core comprised of business parks, high-density residential and retail businesses that feed off the synergy of Santee Trolley Square shopping complex and the Metropolitan Transit System trolley station.

The Santee School District and Grossmont Union High School District oversee K-12 education.

2.1 City Departments

Several City departments and divisions utilize current land management-related functions and will participate in this project, as detailed in the following sub-sections (note that key LMS-related responsibilities or functions have been **bolded**).

2.1.1 City Manager's Office

The City Manager's Office is responsible for the implementation of City Council policies and day-to-day management of the municipal operations. The City Manager advises the City Council on issues facing the City, establishes working relationships with other agencies and municipal organizations whose actions may affect the City, and oversees the City's financial condition. The Office also undertakes economic development initiatives, **directs the City's information technology services**, oversees law enforcement and animal control services, and provides internal programs to maintain a quality workforce.

- ♦ The Information Technology (I.T.) Division oversees all of the City's technology and telecommunications needs, including administration of the City's network operating systems; installation, configuration, testing and maintenance of all hardware and software; day-to-day user support and technical troubleshooting; oversight of the Geographic Information System (GIS); and application support for the City website, the financial system and the Emergency Operations Center (EOC). Support is provided to over 125 users located at four City facilities.

2.1.2 Finance

The Finance Department is responsible for the **collection and investment of City monies**, accounting and financial reporting, budget preparation and administration, debt administration, long-range fiscal planning, purchasing, **business licensing**, parking citation administration, payroll, accounts payable, accounts receivable, and capital asset inventory control.

2.1.3 Development Services

Development Services carries out a variety of functions related to growth and infrastructure. One of its primary tasks is to **promote orderly growth by ensuring that private builders and businesses comply with the city's General Plan as well as local zoning regulations and land-use designations**. Development Services is eager to help residents, property owners, businesses, and builders with their projects.

- ♦ The Engineering Division has the responsibility for Capital Improvements Program (CIP) project programming and implementation, Land Development engineering activities, Traffic Engineering, utility coordination, and the preparation of special studies and reports for the City Council.
 - The Capital Improvement Program section is responsible for the planning, programming, bidding, award and construction of all new City parks, roads and City owned infrastructure, the large-scale maintenance, renovation, and construction of City owned facilities, the coordination and management of emergency facility repairs, and performing construction inspections.
 - The Land Development section administers the Grading, Encroachment, Subdivision and Flood Damage Prevention Ordinances; provides public information on grading and encroachment permits; prepares and reviews grading and improvement plans and administers the Storm Water Program.
 - The Traffic Engineering section is responsible for responding to and investigating citizen requests on traffic issues related to signage, striping, signal operation, traffic calming and improving traffic safety. The Traffic Engineering section is also responsible for maintenance of the City's street lights, traffic signals, street signage and roadway striping, carrying out traffic related projects, seeking grant funding, and traffic review for development projects.
- ♦ The Engineering Division also provides support for projects and programs for the Community Services Department, provides information to outside agencies, **administers all right of way encroachments**, applies for and administers roadway and safety grants and has program responsibility for several other funds including Flood Control, Santee Roadway Lighting District, TransNet, Regional Transportation Congestion Improvement Program (RTCIP) and Gas Tax.
 - The San Diego River flows through the center of Santee, making it one of the City's most prominent features and a major part of the city's parks and trails system. The City's Storm Water Program protects this valuable resource and strives to comply with all federal, state and local regulations which pertain to protecting water quality. Through the implementation of a suite of programs, the City works to prevent pollution and eliminate discharges to the storm water conveyance system and waterways to the maximum extent practicable. Program components include **development and planning review, construction site compliance, commercial and industrial business inspections**, routine maintenance of the City's storm water conveyance

systems, community education and outreach, regional coordination, **complaint/hotline response**, water quality monitoring (sampling), and residential area program implementation.

- ♦ The Planning Division administers planning and development of the City's residential communities, commercial and industrial centers, community parks and open space preserves. Within this framework, the Planning Division provides long-range planning and policy analysis through the preparation, maintenance, and administration of the General Plan and Town Center Specific Plan. Implementation of the physical development process requires coordination with other local, regional, state, and federal agencies to ensure consistency with local regulations, regional policy, and state and federal laws.
 - The Planning Division **provides public information on land development requirements, coordinates environmental reviews, development reviews, building permit issuance, manages the State-mandated Construction Debris Recycling program, assign addresses, and drafts and coordinates environmental review of City-initiated and developer-proposed projects.**
- ♦ The Building Division **provides technical plan review and field inspection services, and coordinates permit approvals with City Departments and outside agencies (County Health Department, Padre Dam Municipal Water District, School Districts, and Air Pollution Control District).** The Building Division **enforces City codes and regulations pertaining to the safe and appropriate use and condition of developed property.** The Building Division **performs plan checks, issues permits, and verifies that work is completed in accordance with the codes.** The Building Division is responsible for compliance with the Americans with Disabilities Act and other state-related mandates governing handicapped access.
 - Building Division **activities are accomplished through contract with a professional firm specializing in these services.** Additionally, the Building Division **produces weekly, monthly, and annual reports that are submitted to the Census Bureau, the County Assessor, the Department of Commerce ("Dodge Reports"), and to the City Finance Department.**
- ♦ The Code Compliance Division works with the community to maintain a safe, healthy, and attractive environment, and to preserve and improve the overall quality of life within Santee's neighborhoods. As such, this Division **interfaces with the public to resolve complaints.** This Division **resolves zoning violations involving property maintenance and land use issues, construction-related issues involving unsafe buildings and non-permitted work, animal complaints, non-permitted signs, inoperable vehicles, junk and debris, parking enforcement, and illicit discharges into the City's municipal storm drain system.** The Abandoned Property and Weed Abatement Programs are administered in this Division and to accomplish this the Code Compliance Division coordinates with other agencies such as the County Sheriff's Department, Fire Prevention Services, County Vector Control, County Health Department and Animal Services.

2.1.4 Community Services

The Community Services Department provides a wide array of services to the community via the following divisions: Public Services, Recreation, Solid Waste and Recycling, Special Events and Facility Operations. The Department initiates and collaborates on park capital improvement projects. Community Services Administration serves as the City's liaison with the community, serving as staff liaison to the Mission Trails Regional Task Force, Santee Park and Recreation

Committee and the Goodan Ranch Policy Committee, and has responsibility for web content and social media.

- ♦ The Recreation Services Division of the Community Services Department provides professional supervision and management of a variety of leisure, recreational and entertainment experiences. Programs and services offered to the community include Instructional Programs and Camps, Special Events, Senior Programs, Teen Center & Programs, Skate and BMX Park, and permitting and use of parks, fields, and facilities. Park, field and facility permits and rentals are coordinated through the Recreation Services Division.

2.1.5 Fire

The Fire Department is responsible for the management and administration of fire and life safety planning, emergency operations, disaster preparedness, emergency medical services, loss prevention, **fire code enforcement**, fire investigation, and hazardous materials mitigation. This department is also responsible for administering City fleet maintenance, citywide communications, and the City's Safety Program.

- ♦ The Fire Department **conducts plan reviews of commercial, multi-family, and selected single family homes**. The Department also conducts annual life safety inspections of commercial and multi-family buildings in the City.

2.2 Solution Capabilities

While an extensive list of specific requirements has been included as APPENDIX B of this RFP, the following discussions dovetail with those requirements and provide additional information to aide in developing a comprehensive response to this RFP.

2.2.1 Required Capabilities

Data Input

Data input should be user-friendly and shall employ “drop downs” and/or “radio buttons” wherever possible to facilitate entry and ensure consistency of data. The proposed solution should be able to support a wide variety of permits with different data entry requirements. In addition to geo-referencing data, the City requires the ability to identify multiple additional attributes (user-defined fields) for each parcel or right of way area. These attributes would be placed on a parcel or area of right of way; examples include but are not limited to the following special areas:

- ♦ Flood zones
- ♦ Very High Fire Hazard Severity Zone / Wildland Urban Interface (WUI)
- ♦ Soil types (C and D)
- ♦ Multiple Species Conservation Program Subarea Plan
- ♦ Right of way moratorium area
- ♦ Gillespie Field Airport Safety Zones

The attributes would show as alerts when a permit is initiated on an associated GIS object.

Geo-referencing

Proposed solutions should be able to attach all data records (i.e., applications, permits, inspections, etc.) to addresses, assessor parcel numbers (APN), road segments, road stations,

storm drain segments, and other GIS objects, as needed. The system should be able to provide a map display of a user selected variable. The map should be able to be exported as a picture or PDF.

Permitting

Proposed solutions should enable the application for, as well as the issuance and monitoring of, all public and private building permit types (i.e., building, grading, mechanical, electrical, encroachments, etc.). The system should support online submittals, as well as allow authorized end-users to link to related records, account for all appropriate fees, and validate licenses of construction professionals. In addition, the system should be able to print out a plan check receipt and a permit and create a variety of auto populated forms to be tailored by the City of Santee. The system should be able to support building permit stipulations required by the State of California.

The types of permits envisioned to use this software are:

- ◆ Building permits
- ◆ Electrical permits
- ◆ Mechanical permits
- ◆ Demolition permits
- ◆ Sign permits (including temporary signs)
- ◆ Fire permits
- ◆ Grading permits
- ◆ Encroachment permits
- ◆ Moving/oversized load permits

The system should initially provide for the online submittal and fee payment for less complex permits such as:

- ◆ Electrical permits
- ◆ Mechanical permits
- ◆ Plumbing permits
- ◆ Residential, roof-top solar photovoltaic permits
- ◆ Encroachment permits
- ◆ Moving permits

Discretionary Land Entitlements

Proposed solution should support the processing of discretionary land entitlements by the Planning and Engineering Divisions. These entitlements should have a discreet process separate from that for building permits, and would include projects such as subdivisions, conditional use permits, rezoning, and grading activities. Important features of this business area would include the ability to trigger assignments and due dates based on workflow steps, and having a detailed, customizable inspection component to support grading inspections.

Code Enforcement

Proposed solution shall provide a means for the monitoring and management of reported codes violations of the Zoning Ordinance, Building Code, Grading Ordinance, Fire Code,

Storm Water Ordinance, Vehicle Code, and Brush Management regulations. The system would allow the public to submit complaints online and to see what complaints are active (without divulging complainant information). The City desires the ability to place warnings or flags on parcels which alert users of active code compliance activity.

Inspection Tracking, Scheduling, and Execution

Proposed solution shall track both routine/periodic inspections of buildings and property (including land-related City assets) as well as inspections relating to issued permits (i.e., building, encroachment, grading, etc.). The system will manage inspection scheduling activities. The system should have the capability to schedule night and weekend inspections as well as the ability to add related restrictions added as permit conditions (e.g., night and weekend work, only). It shall allow inspectors the ability to enter inspection results while onsite through a hand-held mobile device such as mobile phones or tablets. The system will allow the inspector to upload multiple photos, attachments, reports, etc. and permit the inspector to send a notice of correction (if needed), an inspection report, or a passing inspection notification to the point of contact listed on the permit.

The system will allow the contractor or owner to schedule inspections online and view the status of a permit or inspection online. The system shall also allow City staff to track and document any work occurring for a permit or project without an inspection being requested. The system should be capable of allowing and tracking reoccurring inspections.

The system will create and/or allow the inspector to fill out standard City construction inspection and storm water inspection forms and generate/deliver a related inspection report to an associated contact, including maintaining a record of communications with the contact. The City prefers that such messages be sent via the City's email system and automatically associated with the related data record.

Reporting

The system shall provide a comprehensive set of standard reports by location, permit type, etc. It should also allow for a wide variety of user specified queries against any of the solution data fields, including user defined fields. The systems should allow the administrator to easily modify existing or create additional report formats as desired.

Note that a comprehensive list of City-required forms and reports to be generated from and / or available in the City's land management solution has been included as APPENDIX D with this RFP.

Public Online Capabilities

The software must have the capability to integrate with the City's existing website and allow the public to submit permit applications with attachments online for selected permit types, allow for online permit application payment, facilitate online inspection requests (subject to limits/parameters to be established by the City), allow for online submittal of code enforcement complaints, and allow for registered users to see their related permit, inspection, and complaint status information.

Workflow Management

Proposed solution should provide for automated workflow, including the ability to track the plan review progress involving multiple departments and divisions operating in geographically dispersed offices.

At intake, the permit technician would generate a related workflow and assign the plan check to designated staff for review. Individual plan reviewers should be able to complete an

online review of, write or upload corrections, comments, or conditions for each permit reviewed.

The types of workflows should be customizable by the type of permit to be reviewed. Supervisors would be able to discern which plan reviews are overdue and be able to check the workload of individual staff members and reassign reviews as necessary.

The system should provide the ability to support multiple workflow steps concurrently, or to require that workflow steps be completed in sequence for any project. In addition, the system should be able to interact with Microsoft Exchange to provide relevant information updates on the permit status.

Staff time accounting

Proposed solution must provide the capability to link data records to the City's Tyler Eden financial system for required project accounting information, as well as the ability to capture time expended on the related project/task. Entry of time expended (in hours) should be a drop-down menu ranging from 0 to 25 hours (in 0.25-hour increments). The system should be able to generate and print a report, by pay period, of time expended by a selected individual.

Forms

The system shall be able to create forms that can be exported to PDF or as a printer output. These form types include, but are not limited to:

- ◆ Building permit
- ◆ Grading permit
- ◆ Consolidated list of unresolved plan check corrections separated by department
- ◆ Encroachment permit
- ◆ Moving permit
- ◆ Plan check invoice
- ◆ Building permit invoice
- ◆ Fire fees invoice
- ◆ Courtesy notice
- ◆ Notice of violation
- ◆ Certificate of occupancy
- ◆ Certificate of non-compliance
- ◆ Stop work order
- ◆ Inspection card
- ◆ Inspection reports and results
- ◆ Storm water construction site inspection
- ◆ List of discretionary permit conditions of approval
- ◆ A system generated inspection schedule, based on received requests
- ◆ Custom inspection result reports
- ◆ Insufficient funds letter for deposit accounts

- ♦ Deposit refund request to Finance Department

Note that a comprehensive list of City-required forms and reports to be generated from/available in the City's land management solution has been included as APPENDIX D with this RFP.

Training and Support

The system should come with comprehensive online software support documentation for staff and administrator(s).

2.2.2 Desired Capabilities

The following may be considered by the City of Santee as either optional or subject to implementation subsequent to the establishment of Required Capabilities:

Storm Water Facility Inspections

Proposed solution must provide the ability to automate the scheduling of reoccurring inspections of storm water treatment control BMPs, industrial, and commercial businesses at varied frequencies (i.e., semi-annually, annually, etc.). The system would need to link inspections to business licenses that are currently stored in the Tyler Technologies EDEN software system (unless the proposed solution includes related business license functionality that is ultimately implemented by the City as part of this project).

Note that an inventory of the city's treatment control BMPs currently exists in an ArcGIS layer.

Electronic Plan Review

Proposed solution includes a fully integrated electronic plan review / management tool for staff to concurrently review plans, redline plans, comment, upload, convert plans to PDF and publish / share feedback with the applicant. System should provide the capability to easily identify changes made from one submittal to the next, as well as to track different versions of submittals.

2.2.3 Optional Capabilities

Capacity to support online submittal of large plans

Have the capability to accept large set of plans (ARCH D, 24" x 36") and related technical reports (geotechnical, energy efficiency, etc.). This would also involve an online calculation and submittal of plan-check fees.

Fire Inspections

Have a unique module that supports Fire Department inspections of existing commercial, industrial, and multi-family buildings. This includes an inspector performing the inspection using a mobile device, uploading results into the system, and automation of standard forms outlining results and noncompliance issues.

Business Licenses

The City currently manages its business licenses using Tyler Eden; where such integrated functionality is available with the proposed solution, vendor proposals should include this as an optional item for City consideration.

2.3 Current City Fee Schedule

The proposed solutions must be able to accommodate the City's existing, related fees; the City's fee schedule may be found on the City's website at <https://www.cityofsanteeca.gov/home/showpublisheddocument?id=20456>.

3. Project Objectives

The City seeks a proven, fully integrated (i.e., data entered in one proposed solution module is available / viewable as appropriate in other proposed solution modules) LMS solution. It is willing to modify existing business processes to accommodate best practices and will be looking to select a system that drives the implementation of those best practices. More specifically, the proposed solution should provide the following capabilities in terms of its user interface and other general system characteristics:

- ♦ Enhance operational effectiveness by making more timely, accurate and complete information available to citizens, the Mayor and City Council, City Manager, and other City personnel (i.e. dashboard, portal)
- ♦ Increase public access to information and services through online portals/modules
- ♦ Improve management and public policy decision making by increasing the ability to analyze data
- ♦ Allow for ongoing upgrades of technology to support current and future core functional needs
- ♦ Utilize and manage technology in a cost-effective manner
- ♦ Continual innovation to encourage implementation of best business practices (i.e. encourage streamlining and automation of standard business transactions, enhanced and online capabilities, etc.)
- ♦ Enhanced features and functionality to support increased automation and operational efficiencies (i.e. workflow, mobility, online application submission, integrated document management, etc.)
- ♦ Improved reporting and simplified staff access to planning, permitting, inspections and code enforcement data and information for self-serve access and activities
- ♦ Robust audit and transaction logging capabilities
- ♦ Regulatory compliance (such as PCI DSS) to protect personal identifying information and cardholder data, and to adhere to State and Federal mandated regulations
- ♦ An intuitive, consistent (within and across modules), well-designed and browser-based user interface
- ♦ Fully integrated system where data is only entered one-time (single points of data entry) to eliminate re-keying of information but available for viewing or update as appropriate across the functions of the proposed solution
- ♦ Ability to drill into a record to view the supporting source data and documents that have been added, and to drill across from a record into related data in other, integrated modules
- ♦ Processing of transactions in real-time, making data immediately available for inquiry and reporting
- ♦ Ability to easily export information directly to Excel, Adobe, and flat file formats, etc.
- ♦ City-defined fields, reports, and business rules/workflows
- ♦ Ability to modify setup/configuration (i.e., setup codes, report parameters, etc.) without the assistance of the software provider

- ♦ Robust security capabilities with the ability to integrate to MS Active Directory and with the ability to apply security access by role, individual or member of group and apply rules for exception based on functions, departmental data, etc.
- ♦ Ability to define workflow by record-type (i.e., building permit application, code enforcement complaint, etc.) and department, applicable across all appropriate modules
- ♦ Ability to view and manage workloads, assignments, and related thresholds

Additionally, the solution selection will take into consideration the following criteria:

- ♦ How does the system provide **Strategic Alignment** with the City's overall vision and goals?
- ♦ Does the system align with the **Technology Standards** of the City?
- ♦ Are the **Implementation Risks** clear?
- ♦ Does the **Financial Investment** over 5 years meet City budget constraints?
- ♦ Can the needs of the City be met with proposed **Commercial-off-the-Shelf** solution?
- ♦ Does system provide **Information Sharing, Transparency and Robust Reporting**?
- ♦ Does the vendor have a clear approach to achieve **User Buy-In**?

4. Technology

Several systems, applications and manual processes are currently used to support the City's land management-related functions. The CommunityCore system currently supports the Building Services Division in the issuance of building permits, while other City permits are tracked in and issued from Microsoft Access or Microsoft Excel. Code Enforcement cases are tracked in a Microsoft Excel spreadsheet. Business licenses are tracked in the Tyler Eden Licensing module with includes a web extension for online business license applications, renewals, and payments. Additional information regarding current integrations, technology standards, and key business and operational volumes are included in the information that follows. Details related to the City's current LMS technology and solutions is provided in the following section.

4.1 Current LMS Solutions

Table 2, Overview of Current LMS Technology, below and continuing the next page, presents a consolidated list of the applications that support the City's land management services.

Table 2 – Overview of Current LMS Technology

Vendor / Source	Product	Purpose
EsGil Corporation	CommunityCore	<ul style="list-style-type: none"> • Building permits
Microsoft	Access	<ul style="list-style-type: none"> • Encroachment permit tracking
Microsoft	Excel	<ul style="list-style-type: none"> • Code enforcement case tracking
Streamline Automation Systems	Streamline Inspections	<ul style="list-style-type: none"> • Fire inspections
Esri	ArcGIS Enterprise v10.8.1	<ul style="list-style-type: none"> • Geospatial data; the City has a full GIS Pro server
Tyler	Cashiering	<ul style="list-style-type: none"> • Cash receipts
Tyler	Eden	<ul style="list-style-type: none"> • General ledger financial data for land management activities • Business licensing
San Diego County	SanGIS	<ul style="list-style-type: none"> • Parcel, ownership data updated on a bimonthly basis
State of CA	California Environmental Reporting System (CERS)	<ul style="list-style-type: none"> • Reporting of hazardous waste and hazardous materials data related to permits issued as well as related inspections, compliance, and enforcement
State of CA	California State Licensing Board (CSLB) website	<ul style="list-style-type: none"> • California construction professional licenses and worker's compensation verification

4.2 City Technology Standards

Table 3, Technology Standards, identifies technology standards for the City. Proposers will be required to conform to these requirements or clearly articulate proposed alternatives.

Table 3 – Technology Standards

Technology	Current Standard
Database(s)	Microsoft SQL Server 2019
Server OS	Windows 2019 64-bit Data Center
Desktop OS	Windows 10
Server Hardware	Dell Power Edge R730
Desktop Hardware	Dell OptiPlex 7060
Laptop/Mobile Hardware	iPad 7th Gen 32GB
Office Productivity	Microsoft Office Professional Plus 2019
Browser	Edge, Chrome, Safari
Email Server/Client	Exchange 2016 / Client Outlook 2019
Active Directory	Yes
VPN	Yes

4.3 Interfaces / Integrations

The City looks to identify best practices and have the new solution provide required functionality where possible; when not possible, the proposed solution should provide for integration to external systems supporting City requirements. An integration means an automated process where data inputs and outputs are shared within systems *in real time*. Automated process would mean that there is no manual intervention. Table 4, Required LMS Integrations, which begins on the next page, identifies the integrations that will be required with the new land management system.

Table 4 – Required LMS Integrations

Vendor	Product	Interface Requirements
Tyler Technologies	Eden	<ul style="list-style-type: none"> • To Financials (real time) <ul style="list-style-type: none"> ○ Invoices ○ Payments received ○ Deposit information for account setup ○ Deposit amounts received ○ Refund Authorizations ○ Time Entry data by permit/project, to be accumulated and included on monthly statement of deposit account • From Financials (real time) <ul style="list-style-type: none"> ○ Confirmation of payment amounts received ○ Deposit account numbers for tracking in LMS solution ○ Confirmation of deposit amounts received ○ Confirmation of amounts charged against deposit account, including additional project-related fees that may be processed by Finance ○ Confirmation of refunds issued
Tyler Technologies	Tyler Cashiering	<ul style="list-style-type: none"> • To Cashiering (real time) <ul style="list-style-type: none"> ○ Cash payments received • From Cashiering (real time) <ul style="list-style-type: none"> ○ Confirmation of cash payments received
Global Payments Integrated (formerly OpenEdge Payments, LLC)	OpenEdge	<ul style="list-style-type: none"> • To OpenEdge (real time) <ul style="list-style-type: none"> ○ Online payments received from proposed solution • From OpenEdge (real time) <ul style="list-style-type: none"> ○ Confirmation of online payments received from proposed solution
Tyler	Bus Eden Licensing Module, including the Business License Web Extension <i>(unless replaced with new solution)</i>	<ul style="list-style-type: none"> • To Tyler Licensing Module (real time) <ul style="list-style-type: none"> ○ Business Name or other identification • From Tyler Web Extension (real time) • Business License validation and current license status
Streamline Automation Systems	Streamline Inspections	<ul style="list-style-type: none"> • To Streamline <ul style="list-style-type: none"> ○ N/A • From Streamline • Fire inspection outcomes

Vendor	Product	Interface Requirements
Microsoft	Microsoft Office Excel Word Outlook	<ul style="list-style-type: none"> • To Excel (real time) <ul style="list-style-type: none"> ○ Data inquiry exports • From Excel (real time) <ul style="list-style-type: none"> ○ Dataset imports ----- • To Word (real time) <ul style="list-style-type: none"> ○ Data records to fill templates • To Outlook (real time) <ul style="list-style-type: none"> ○ Emails, calendar entries ----- • From Outlook (real time) • Emails, calendar entries
Esri	ArcGIS Enterprise v10.8.1	<ul style="list-style-type: none"> • To Esri (real time) <ul style="list-style-type: none"> ○ Document links/pointers (?) • From Esri (real time) <ul style="list-style-type: none"> ○ Document links/pointers (?) • Confirmed parcel/property ownership data
State of CA	Contractors State Licensing Board	<ul style="list-style-type: none"> • To CSLB (real time) <ul style="list-style-type: none"> ○ Construction Professional License Number, Firm Name, or First Name & Last Name • From CSLB (real time) <ul style="list-style-type: none"> ○ Current License status (& expiration date?) ○ Bonding information (?) • Workers Compensation Insurance validation

Table 5, Potential Additional LMS Integrations, beginning below and continuing on the next page, identifies the integrations that remain under consideration for the City's new land management system. A final decision on whether these integrations will be implemented will be made at a later date; however, vendor proposals should note whether these integrations can be accommodated with the proposed solution.

Table 5 – Potential Additional LMS Integrations

Vendor	Product	Interface Requirements
Tyler Technologies	Eden	<ul style="list-style-type: none"> • To Payroll (batch) • Time Entry data by permit/project, to be interfaced with Tyler Web Extension
Questys	Questys	<ul style="list-style-type: none"> • To Questys (real time) <ul style="list-style-type: none"> ○ Document submissions included with project/permit applications, inspections, code enforcement activities and other LMS solution records • From Questys (real time) <ul style="list-style-type: none"> ○ Documents / file attachments related to applicable solution records in an end-user's session

Vendor	Product	Interface Requirements
State of California Environmental Protection Agency	California Environmental Reporting System (CERS)	<ul style="list-style-type: none"> To CERS <ul style="list-style-type: none"> Data regarding hazardous material regulatory activities, chemical inventories, underground and aboveground storage tanks, and hazardous waste generation, including data related to inspections and enforcement actions
County of San Diego, Department of Environmental Health, Hazardous Waste Division		<ul style="list-style-type: none"> To DEH

4.4 Data Conversion

The City desires to retain, convert and load its current and historical data (including records, libraries, supporting documents, and related file attachment meta-data) to the *proposed solution*. Table 6, Data Conversion Requirements on the next page provides a list of data by functional areas and a description.

Table 6 – Data Conversion Requirements

Current Repository	Description
CommunityCore	<ul style="list-style-type: none"> Building Permit applications, Permits issued
Microsoft Excel	<ul style="list-style-type: none"> Discretionary Permit applications, Permits issued Encroachment Permit applications, Permits issued Code Complaints
Microsoft Access	<ul style="list-style-type: none"> Engineering Encroachment Inspections

4.5 Business and Operational Metrics

Table 7, Business and Operational Metrics, provides Proposer with key information that will help promote an understanding of the current environment.

Table 7 – Business and Operational Metrics

Development Services / Planning Division	
Category	Metric (FY 2020 – 21)
Development Pre-application Reviews	<ul style="list-style-type: none"> Six
Development Application Reviews / Approvals	<ul style="list-style-type: none"> 21 / 15
Plan Checks	<ul style="list-style-type: none"> ~350
Grading Permit Reviews	<ul style="list-style-type: none"> 25

Development Services / Planning Division	
Category	Metric (FY 2020 – 21)
Building Permit Reviews	• Same as “Plan Checks”
Other Permit Reviews (Signs, Special Events, etc.)	• 35 (antenna permits, temporary sign permit, sign permit, temp. use permit)
Inspections	• 30
Development Services / Engineering Division	
Category	Metric (FY 2020 – 21)
Encroachment Application Reviews / Approvals	• 225
Grading Permit Reviews / Approvals	• 25
Other Permit Reviews (Haul/Traffic, Moving, Improvements, etc.)	• 96
Cash Securities, Bonds Held (Grading, Erosion Control)	• 4 grading projects collected bonds & securities
Plan Checks	• ~350
Inspections	• 1,740
Development Services / Building Division	
Category	Metric (FY 2020 – 21)
New Residential Building Application Reviews / Approvals	• 112
Residential Addition/Remodel Application Reviews / Approvals	• 87
New Commercial Building Application Reviews / Approvals	• 4
Commercial Addition/Remodel Application Reviews / Approvals	• 35
Other Application Reviews / Approvals (MEP, Solar, Reroof, Demo, Pool, etc.)	• 624 Residential Solar Projects, 698 MEP, 142 Reroofs, 49 Pools, 18 Wall Signs
Residential Inspections	• ~4,700 trade inspections on ~1,550 stops
Commercial Inspections	• ~520 trade inspections on ~175 stops
Final Inspections – Residential	• 620
Final Inspections – Tenant Improvements	• 20
Final Inspections – Commercial	• 0
Development Services / Code Compliance	
Category	Metric (FY 2020 – 21)
Code Complaints Received from the Public	• Unknown, currently don’t track
Code Enforcement Cases Opened	• Approximately 300, not including parking violation complaints

Development Services / Planning Division	
Category	Metric (FY 2020 – 21)
Code Enforcement Cases Closed	<ul style="list-style-type: none"> Approximately 300, not including parking violation complaints
Inspections	<ul style="list-style-type: none"> Approximately 1,050, not including parking violation complaints
Fire	
Category	Metric (FY 2020 – 21)
Plan Reviews	<ul style="list-style-type: none"> ~350
Weed Abatement Complaints Received	<ul style="list-style-type: none"> Contracted with Fire Prevention Services
Inspections	<ul style="list-style-type: none"> ~25
Finance	
Category	Metric (FY 2020 – 21)
Deposit Accounts Open	<ul style="list-style-type: none"> 35 deposit accounts opened
Permit-related Invoices	<ul style="list-style-type: none"> ~1,100
City Clerk	
Category	Metric (FY 2020 – 21)
Developer Securities, Bonds Held	<ul style="list-style-type: none"> 4 (this number reflects what the Engineering group took in)

5. Proposal Submission Requirements

5.1 General Instructions

The City discourages lengthy and costly proposals. Proposal should be prepared simply and economically and provide a straightforward, concise description of the Proposer's company, qualifications, proposed solution, and capabilities to satisfy the requirements of this RFP. Emphasis should be on completeness and clarity of content. Glossy sales and marketing brochures are not necessary or desired.

Proposal must be organized consistently with the outline provided in this section of the RFP. Proposer must follow all formats and address all portions of the RFP set forth herein providing all information requested. Proposer may retype or duplicate any portion of this RFP for use in responding to the RFP, provided that the proposal clearly addresses all the City's information requirements.

5.2 Proposal Format

Proposal must be structured, presented, and labeled in the following manner:

- ♦ Cover Letter
- ♦ Table of Contents
- ♦ Section 1 – Executive Summary
- ♦ Section 2 – Company Background
- ♦ Section 3 – Company Qualifications
- ♦ Section 4 – References
- ♦ Section 5 – Proposed Solution
- ♦ Section 6 – Implementation Approach
- ♦ Section 7 – Other Requirements
- ♦ Section 8 – Pricing
- ♦ Section 9 – Software Licensing and Maintenance Agreements

Failure to follow the specified format, to label the responses correctly, or to address all the subsections may, at the City's sole discretion, result in the rejection of the Proposal.

Proposal should be prepared on standard 8 1/2" x 11" paper and printed on 2 sides. All proposal pages should be numbered.

5.2.1 Cover Letter

The proposal must include a cover letter that provides the following:

- ♦ Proposer's legal name and corporate structure
- ♦ Proposer's primary contact to include name, address, phone, and email
- ♦ Identification of use of subcontractors and scope of work to be performed by subcontractors
- ♦ Identification of any pending litigation against the Proposer
- ♦ Disclosure of any bankruptcy or insolvency proceedings in last 10 years
- ♦ Statement of the Proposer's credentials to deliver the services sought under the RFP

- ♦ Statement indicating that the proposal remains valid for at least 120 days
- ♦ Statement that the Proposer or any individual who will perform work for the Proposer is free of any conflict of interest (e.g., employment by the City)
- ♦ Statement of acknowledgement that the City's legal documents have been reviewed and accepted with or without qualification. If qualifications are involved, those items requiring adjustment or modification must be identified and listed along with suggested modifications to the contract. If no modifications are noted, the City will assume that the proposer can perform all normal tasks and services without reservation or qualification to the contract
- ♦ Signature of a company officer empowered to bind the Proposer to the provisions of this RFP and any contract awarded pursuant to it

The Proposal Cover Letter should be concise and brief and not exceed two pages unless Proposer's exceptions to the City's legal documents require it.

5.2.2 Table of Contents

All pages are to be numbered and figures, tables, charts, etc. must be assigned index numbers and identified in the Table of Contents.

5.2.3 Section 1 - Executive Summary

This section should provide a brief and concise synopsis of Proposer's proposal and a description of the Proposer's credentials to deliver the services sought under the RFP. The Executive Summary should not exceed 3 pages.

5.2.4 Section 2 – Company Background

This section of the proposal should identify the following:

- ♦ 2.1 – A brief description of the Proposer's company background and organizational history
- ♦ 2.2 – A statement of how long the Proposer has been performing the services required by this RFP
- ♦ 2.3 – Identify the location of headquarters, technical support, and field offices
- ♦ 2.4 – Identify the location of the office which would service the City
- ♦ 2.5 – Identify Proposer's annual company revenues and profit for the last three company fiscal years

The Background section should not exceed 3 pages.

5.2.5 Section 3 – Company Qualifications

In this section of the proposal, the Proposer should identify company qualifications and experience in implementing solutions similar to what the City is seeking:

- ♦ 3.1 – Describe the Proposer's familiarity with land management systems and associated business processes, including experience with the requirements of the State of California (i.e., CERS). Please include acknowledgement of whether the Proposer is an Esri Business Partner, and if so, for how many years.

If the Proposer is a joint venture or consortium, the qualifications of each participating firm should be separately identified, including indication of the percentage of services to be provided by each party to the joint venture or consortium. The firm planned to serve

as the principal under the terms of any potential agreement with the City should also be identified.

- ♦ 3.2 – Identify the Proposer's existing client base including the number of existing clients using the version / release of the software system being proposed. Clearly identify the number of California public agency installations.

The Company Qualifications section should not exceed 3 pages.

5.2.6 Section 4 - References

The Proposer must provide at least five (5) public agency references that are comparable to the City of Santee for which the Proposer has provided similar solutions, scope, and services (identified references MUST be for the purchase/licensing and implementation of land management-related solutions). Further, at least three (3) of the references must be for similar systems that have been implemented in the last five (5) years. Note that references from California agencies of similar size and complexity to the City are preferred.

For each reference, Proposer must provide the following information:

- ♦ Agency name and contact information (i.e. name, title, address, phone, and email)
- ♦ Brief project description, including identification of the software module(s) and version implemented, and project duration
- ♦ Number of agency employees
- ♦ Agency general fund budget
- ♦ Implementation date
- ♦ Implementation timeline and cost

5.2.7 Section 5 - Proposed Solution

In this section of the proposal, the Proposer should identify the proposed solution up to and including the following:

- ♦ 5.1 – Provide a brief solution overview identifying origin of system, release history, current release being proposed, and number of operational installations for the proposed software solution.
- ♦ 5.2 – Provide a written description for each module included in the Proposal. It is important to note that the level of detail must be sufficient to allow the evaluators to understand your product's features, functions, capabilities and shortcomings/challenges and to ensure an adequate understanding of how the proposed solution will meet the City's needs. Proposers may supplement their response to Section 5 using additional product information as an attachment to their Proposal.
- ♦ 5.3 – Complete the LMS Requirements document (APPENDIX B) that has been provided in Microsoft Word format. The document should be completed for each line item based on the following criteria: Y – Meets/Exceeds, N – Does not Meet, W/C – Workaround or Customization Required, or T – Alternate / 3rd Party Solution Required. Proposer is to respond with a single option and are encouraged to provide written response to adequately explain each response.
- ♦ 5.4 – Identify any additional functionality or recommended modules or services not already identified but that the Proposer recommends that the City consider. Include a description of the features and functions of each additional proposed module, service, or recommended 3rd party solution.

- ♦ 5.5 – Confirm ability to conform to the requirements in RFP Section 4.2 City Technology Standards, or clearly articulate proposed alternatives.
- ♦ 5.6 – RFP Section 4.3 Interfaces / Integrations documents the City’s required LMS integrations with a proposed solution, detailed in Table 4, Required LMS Integrations. Proposer’s must identify the recommended method for integration for each identified system.
- ♦ 5.7 – RFP Section 4.4 Data Conversion identifies the City’s current conversion requirements; in this section of the RFP response, Proposers should describe their recommended approach and related methodology to meet the City’s desire to retain and convert data to the proposed solution, detailed in Table 6, Conversion Requirements. Proposers should identify all involved activities and responsible party (i.e., vendor, City) for the tasks to complete a successful data conversion.

5.2.8 Section 6 - Implementation Approach and Work Plan

The Proposer should identify the proposed implementation approach, clearly identifying each phase, the timeline proposed, roles and responsibilities to be performed by the Proposer and those to be performed by the City. The Proposer response should be reflective of the City’s timeline and approach for implementation and should clearly indicate the City resource requirements to meet the vendor proposed schedule.

- ♦ 6.1 – Describe your implementation and project management methodology and approach to ensure a successful implementation.
- ♦ 6.2 – Provide a project organization chart highlighting the key staff who will be assigned to the project. Provide biographies for the project manager and other assigned resources.
- ♦ 6.3 – Provide a detailed work plan that identifies major activities, tasks, deliverables, and resources. **The work plan should assume that the proposed solution will be implemented by December 1, 2022).**
- ♦ 6.4 – Describe the roles and responsibilities of the City staff during implementation, and provide an estimated number of City resources, expected role and level of effort during each phase of the project.
- ♦ 6.5 – Describe the conversion methodology that will be used to implement the proposed solution. In addition, recommend what the City should convert (content and how many years of history) from the current system.
- ♦ 6.6 – Describe your training methodology and how you ensure users are prepared to use the proposed solution.
- ♦ 6.7 – Identify and describe your recommendations to ensure end-user buy-in and adoption of the new system and related procedures/processes by City staff.
- ♦ 6.8 – Describe how the use of any alternate service delivery models would impact the proposed implementation approach, work plan, and City staff level of effort (i.e., Will vendor staff work onsite or remotely? Will system configuration be limited to demonstrating how to complete specific configuration tasks by example, with City responsibility for completing the balance of the related configuration?).

5.2.9 Section 7 – Other Requirements

In this section of the proposal, the Proposers should address the following items in a concise manner:

- ♦ 7.1 – Describe ongoing maintenance, release/upgrade, and support services. At a minimum, Proposers should address the following items:
 - Help desk processes and procedures
 - Hours of support (stated in Pacific Standard Time)
 - Escalation procedures
 - Response time commitments
- ♦ 7.2 – Identify if there are solution user groups and / or user conferences
- ♦ 7.3 – Provide hardware and database specifications for the proposed solution. As part of Proposer's response, confirm your acceptance of the City's technical standards.
- ♦ 7.4 – Describe the frequency that application patches and releases have been made available within the past two years. In addition, clearly identify the roles and responsibilities of the City to complete updates.

5.2.10 Section 8 - Pricing

The City seeks a clear and comprehensive understanding of all costs associated with the proposed solution, including implementation and ongoing software maintenance / support fees. In this section, the Proposer must itemize all of those costs. The City will evaluate proposals based on the "Total Cost to Implement (TCI)" and the "Total Cost to Operate (TCO)." TCI will include all costs required for a successful implementation. The TCO will be calculated based on TCI plus five years of annual maintenance fees.

The Proposer's price sheet(s) must identify all costs required to complete a successful implementation, including:

- ♦ Solution pricing
 - Software Licensing and Maintenance Costs
 - Pricing of first year support costs should be identified and listed separately from annual software fees
- ♦ Implementation Services
 - Software Installation and Configuration
 - Project Management
 - Business Process Review
 - Testing Support
 - Training
 - Documentation
 - Change Management
- ♦ Post Implementation Support Services
 - Provide pricing for optional post-implementation support
- ♦ Data Conversion
 - Provide breakdown based on data conversion requirements as identified in the RFP

- ♦ Interface Services
 - Provide breakdown based on interface requirements as identified in the RFP
- ♦ 3rd party products required for proposed solution
 - Include all software, hardware, and services
- ♦ Optional offerings
 - Include all software, hardware, and services
- ♦ Consultant travel and expenses not otherwise included in the implementation costs
- ♦ Professional Services rates

The City has provided Proposer with a mandatory electronic (Microsoft Excel) spreadsheet with a pricing template **that must be filled out completely and included in *native Microsoft Excel format (not PDF)*** with the Proposer's response and under separate cover. The City will evaluate solution pricing based solely on the information provided in the pricing templates. The templates provide space for Proposer to identify any assumptions or comments necessary to ensure the City understands what is being proposed (refer to APPENDIX C – VENDOR COST WORKSHEET.)

The Proposer's response to the Pricing section must include completion of the following components:

- ♦ Application Module Pricing – This section of the pricing proposal should clearly identify the proposed software modules that are required to meet the RFP requirements; the Proposer is strongly encouraged to provide a detailed breakout of software module pricing to help the City assess the cost of the proposed solution. Proposer must identify the number of user licenses being proposed for each module and note its justification for number of licenses being proposed (i.e., standard licensing model, estimated number of users, etc.), and whether individual licenses are for named users only.
- ♦ Implementation Services – This section of the pricing proposal should clearly identify the quantity, hourly rate, and total cost for all professional services the Proposer will provide to ensure a successful implementation. Proposer is encouraged to provide a breakdown of the service categories that will be provided to support the implementation to allow evaluators to understand the level of effort, resources, and cost of services. Services must be broken down by category (i.e., consulting/configuration, project management, training, etc.).
- ♦ Integrations - Interfaces – This section of the pricing proposal should clearly identify the one-time and annual costs associated with providing the interfaces, exports and imports of data with other systems if not defined as part of the proposed solution.
- ♦ Data Conversions – This section of the pricing proposal should clearly identify the costs associated with data conversion from the existing systems to the proposed solution.
- ♦ 3rd Party Products – This section of the pricing proposal should clearly identify any 3rd party software and / or specialty hardware that will be required to fully implement the proposed solution to meet the RFP requirements. The City desires to include all 3rd party costs in the total project costs.
- ♦ Optional Offerings – This section of the pricing proposal should identify any optional product or service offerings the Proposer would like the City to consider. The City is interested in understanding and evaluating other products and services of the Proposer. If Proposer believes they have additional products and services that might be of interest to the City, please itemize that information in the Optional Offerings Price Sheet.

- ♦ Travel – This section of the pricing proposal should clearly identify the projected travel costs associated with Proposer’s implementation services. The Proposer should identify the anticipated number of trips, days of service per trip, and estimated per trip cost. The City will reimburse the selected Proposer based on actual trip expenses supported by receipts and documentation.
- ♦ Professional Services – The City seeks hourly pricing for additional services that may be required during the implementation. Proposer should provide an hourly rate for any professional services categories offered as part of the proposal. If necessary, the City will use these rates to purchase additional services.

5.2.11 Section 9 – Software Licensing and Maintenance Agreements

In this section, the Proposer must provide any software licensing and maintenance agreements that will be required to implement the Proposer’s solution.

6. Proposal Evaluation

6.1 Vendor Proposal Review

An Evaluation Committee shall review all proposals to determine which Proposers have qualified for consideration. The evaluation will include both an initial review and a detailed review. The initial review will evaluate all submissions for conformance to stated RFP requirements and specifications to eliminate all responses that deviate substantially from the RFP's intent and/or fail to satisfy the mandatory requirements. Only those proposals that meet or exceed the mandatory requirements will be further evaluated.

Selection of any Proposals to be advanced to the demonstration phase of this procurement shall be based on the following criteria combined:

- ♦ Proposal provides the requested information and meets the standards identified in Section 5 Proposal Submission Requirements of this RFP
- ♦ Written Proposal quality, clarity, and completeness
- ♦ Proposer conveys an understanding of the work required to complete this project in a professional and timely manner
- ♦ Proposer's ability to meet the identified needs and functionality required by the City
- ♦ Proposer's commitment to continually evolving the system to remain current with evolving best practices
- ♦ Proposer's professional qualifications and experience with engagements of similar scope and complexity and for similarly sized clients, including the experience of staff to be assigned to this project
- ♦ Proposer's availability to schedule and complete the project according to the City's preferred timeframe
- ♦ Cost effectiveness of the Proposal compared to the requested scope of work
- ♦ Perceived risk to the City arising from selection of a Proposal

Note: Cost, while a consideration, will not be the overriding factor for award. The decision by the City to award a contract will be based on a combination of factors determined to be in the best interest of the City. After evaluating the proposals and discussing them further with the finalists or the tentatively selected vendor, the City reserves the right to further negotiate the proposed work and/or method and amount of compensation.

The City reserves the right, at its sole discretion, to request clarifications of proposals or to conduct discussions for the purpose of clarification with any or all Proposers. The purpose of any such discussions shall be to ensure full understanding of the proposal. Discussions shall be limited to specific sections of the proposal identified by the City and, if held, shall be after initial evaluation of Proposals is complete. If clarifications are made because of such discussion, the Proposer shall put such clarifications in writing.

6.2 Proof of Capabilities

Based on a review of the vendor proposals received, the City will shortlist a limited number of vendor proposals to continue with further evaluation through proof of capabilities (POC) sessions – scripted scenarios that will demonstrate the proposed solution's capabilities as related to the City's requirements. Each short-listed vendor will be provided the scripted scenarios that are to be used to prepare for a demonstration of the proposed solution.

Specific dates and times for POC sessions for each short-listed vendor will be finalized at a later date, but vendors should be prepared to conduct the demonstration with three weeks of advance notification (targeted to the period identified in Table 1 – RFP Schedule of Events provided in Section 1.2 RFP Timeline within this RFP. *As previously noted, a determination will be made closer to the scheduled date of the POCs as to whether these sessions will be scheduled for onsite or remote delivery; the City will work with the selected vendor(s) to ensure the safety and well-being of all participants in light of the on-going COVID-19 health crisis.*

The short-listed vendors will be cumulatively evaluated on the basis of the POC demonstrations, as well as any additional discovery required, the results of formal reference checks, and – at the option of the City – organized site visits at vendors' customer sites (City due diligence). In tandem with the City's POCs, vendors must be prepared to provide the City with a list of three (3) of their current customer sites for which similar implementations have been completed. Customer sites identified must be using the same major version of the software (and the same software components) being proposed to the City, for an implementation effort that is similar in scope and complexity to the City's, and geographically close to City, if possible.

7. General Conditions

This Request for Proposal (RFP) does not commit the City of Santee to award a contract, to defray any costs incurred in the preparation of a proposal, or to procure or contract for services. The City reserves the right to accept or reject any or all proposals received in response to this request, to negotiate with any qualified source, or cancel in whole or in part this RFP if it is in the best interest of the City to do so. The City reserves the right to retain all proposals submitted and use any idea in a proposal regardless of whether or not that proposal was selected.

Subsequent to contract negotiations, prospective firms may be required to submit revisions to their proposals. All firms submitting a proposal should note that the execution of any contract pursuant to this RFP is dependent upon the recommendation of the City selection committee and the approval of the Santee City Council.

7.1 Public Records

All proposals submitted and information included therein shall become the property of the City of Santee and public records, and as such may be subject to public review.

7.2 Addenda

Any changes to this RFP are invalid unless specifically modified by the City and issued as a separate addendum document. Should there be any question as to changes to the content of this document; the City's copy shall prevail. In the event this RFP is obtained through any means other than the City's website, the City will not be responsible for the completeness, accuracy or timeliness of the RFP document.

7.3 Equal Opportunity

The City endeavors to do business with firms sharing the City's commitment to equal opportunity and will not do business with any firm that discriminates on the basis of race, religion, color, ancestry, age, gender, sexual orientation, disability, medical condition or place of birth.

7.4 Right to Cancel

The City reserves the right to cancel, for any or no reason, in part or in its entirety, this RFP including but not limited to: selection schedule, submittal date, and submittal requirements. If the City cancels or revises the RFP, all Proposers will be notified in writing by the City.

7.5 Conflict of Interest

The City complies with all California statutes and regulations related to conflicts of interest.

7.6 Insurance Requirements

The City requires consultants doing business with it to obtain insurance as shown in the standard Professional Services Agreement. The required insurance certificates must comply with all requirements of the standards as shown in attached APPENDIX A – CITY PROFESSIONAL SERVICES AGREEMENT, and must be provided (original copy) within fifteen (15) days of notice of selection and prior to the commencement of the Work.

7.7 Business License

The selected firm will be required to obtain a Santee business license upon award of the contract. Current cost: \$90.00 for initial license (valid for one year); \$35.00 for annual renewal.

8. General Requirements

8.1 Collusion

By submitting a response to the RFP, each Proposer represents and warrants that its response is genuine and made in the interest of or on behalf of any person not named therein; that the Proposer has not directly induced or solicited any other person to submit a sham response or any other person to refrain from submitting a response; and that the Proposer has not in any manner sought collusion to secure any improper advantage over any other person submitting a response.

8.2 Gratuities

No person will offer, give, or agree to give any City employee or its representatives any gratuity, discount, or offer of employment in connection with the award of contract by the City. No City employee or its representatives will solicit, demand, accept or agree to accept from any other person a gratuity, discount or offer of employment in connection with a City contract.

8.3 Required Review and Waiver of Objections by Proposers

Proposers should carefully review this RFP and all attachments, including but not limited to the Standard Professional Services Agreement, for comments, questions, defects, objections, or any other matter requiring clarification or correction. Comments concerning RFP objections must be made in writing and received by the City no later than the "Deadline for Written Questions and Comments" detailed in Table 1, RFP Schedule of Events. This will allow issuance of any necessary amendments and help prevent the opening of defective proposals upon which contract award could not be made.

Protests based on any objection will be considered waived and invalid if these faults have not been brought to the attention of the City, in writing, by the Deadline for Written Questions and Comments.

8.4 Nondiscrimination

No person will be excluded from participation in, be denied benefits of, be discriminated against in the admission or access to, or be discriminated against in treatment or employment in the City's contracted programs or activities on the grounds of disability, age, race, color, religion, sex, national origin, or any other classification protected by federal or California State Constitutional or statutory law; nor will they be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of contracts with the City or in the employment practices of the City's contractors. Accordingly, all Proposers entering into contracts with the City will, upon request, be required to show proof of such nondiscrimination and to post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.

8.5 Proposal Withdrawal

To withdraw a proposal, the Proposer must submit a written request, signed by an authorized representative, to the RFP Coordinator (Section 1.3) up until the RFP submission deadline, according to Section 1.2 RFP Timeline. After withdrawing a previously submitted proposal, the Proposer may submit another proposal at any time up to the deadline for submitting proposals.

8.6 Proposal Errors

Proposer is liable for all errors or omissions contained in their proposal. Proposer will not be allowed to alter proposal documents after the deadline for submitting a proposal.

8.7 Incorrect Proposal Information

If the City determines that a Proposer has provided, for consideration in the evaluation process or contract negotiations, incorrect information which the Proposer knew or should have known was materially incorrect, that proposal will be determined non-responsive, and the proposal may be rejected.

8.8 Prohibition of Proposer Terms and Conditions

A Proposer may not submit the Proposer's own contract terms and conditions in a response to this RFP. If a proposal contains such terms and conditions, the City, at its sole discretion, may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

8.9 Assignment and Subcontracting

The Contractor may not subcontract, transfer, or assign any portion of the contract without prior written approval from the City. Each subcontractor must be approved in writing by the City. The substitution of one subcontractor for another may be made only at the discretion of the City and with prior, written approval from the City.

Notwithstanding the use of approved subcontractors, the Proposer, if awarded a contract under this RFP, will be the prime contractor, will be responsible for all work performed, and will be responsible for all costs to subcontractors for services provided by the Proposer. The Proposer is prohibited from performing any work associated with this RFP or using contractors for any service associated with this RFP offshore (outside the United States).

8.10 Right to Refuse Personnel

The City reserves the right to refuse, at its sole discretion, any subcontractors or any personnel provided by the prime contractor or its subcontractors. The City reserves the right to interview and approve all Proposers' staff. Proposer's staff may be subject to the City's background and drug testing processes at any time.

8.11 Proposal of Additional Services

If a Proposer indicates an offer of services in addition to those required by and described in this RFP, these additional services may be added to the contract before contract signing at the sole discretion of the City.

8.12 Licensure

Before a contract pursuant to this RFP is signed, the Proposer must hold all necessary, applicable business and professional licenses. The City may require any or all Proposers to submit evidence of proper licensure.

8.13 Conflict of Interest and Proposal Restrictions

By submitting a response to the RFP, the Proposer certifies that no amount will be paid directly or indirectly to an employee or official of the City as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Proposer in connection with the procurement under this RFP.

Notwithstanding this restriction, nothing in this RFP will be construed to prohibit another governmental entity from making a proposal, being considered for award, or being awarded a contract under this RFP.

Any individual, company, or other entity involved in assisting the City in the development, formulation, or drafting of this RFP or its scope of services will be considered to have been given information that would afford an unfair advantage over other Proposers, and said individual, company, or other entity may not submit a proposal in response to this RFP.

8.14 Contract Negotiations

After a review of the proposals and completion of the POC session and additional due diligence, the City intends to enter into contract negotiations with the selected Proposer. These negotiations could include all aspects of services and fees. If a contract is not finalized in a reasonable period of time, the City will open negotiations with the next ranked service provider.

8.15 Execution of Contract

If the selected Proposer does not execute a contract with the City within thirty (30) business days after notification of selection, the City may give notice to that service provider of the City's intent to select from the remaining Proposers or to call for new proposals, whichever the City deems appropriate.

8.16 Right of Rejection

The City reserves the right, at its sole discretion, to reject any and all proposals or to cancel this RFP in its entirety.

Any proposal received which does not meet the requirements of this RFP may be considered to be nonresponsive, and the proposal may be rejected. Proposers must comply with all of the terms of this RFP and all applicable State laws and regulations. The City may reject any proposal that does not comply with all of the terms, conditions, and performance requirements of this RFP.

Proposer may not restrict the rights of the City or otherwise qualify their proposal. If a Proposer does so, the City may determine the proposal to be a nonresponsive counteroffer, and the proposal may be rejected.

The City reserves the right, at its sole discretion, to waive variances in technical proposals provided such action is in the best interest of the City. Where the City waives minor variances in proposals, such waiver does not modify the RFP requirements or excuse the Proposer from full compliance with the RFP. Notwithstanding any minor variance, the City may hold any Proposer to strict compliance with the RFP.

8.17 Disclosure of Proposal Contents

All proposals and other materials submitted in response to this RFP procurement process become the property of the City. Selection or rejection of a proposal does not affect this right. All proposal information, including detailed price and cost information, will be held in confidence during the evaluation process. Upon the completion of the evaluation of proposals, the proposals and associated materials will be open for review by the public to the extent allowed by the California Public Records Act, (Government Code Section 6250-6270 and 6275-6276.48). By submitting a proposal, the Proposer acknowledges and accepts that the contents of the proposal and associated documents will become open to public inspection.

8.18 Proprietary Information

The master copy of each proposal will be retained for official files and will become public record after the award of a contract unless the proposal or specific parts of the proposal can be shown to be exempt by law (Government code §6276). Each Proposer may clearly label part of a proposal as "CONFIDENTIAL" if the Proposer thereby agrees to indemnify and defend the City for honoring such a designation. The failure to so label any information that is released by the City will constitute a complete waiver of all claims for damages caused by any release of the information. If a public records request for labeled information is received by the City, the City will notify the Proposer of the request and delay access to the material until seven working days after notification to the Proposer. Within that time delay, it will be the duty of the Proposer to act in protection of its labeled information. Failure to so act will constitute a complete waiver.

8.19 Severability

If any provision of this RFP is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected; and the rights and obligations of the City and Proposer will be construed and enforced as if the RFP did not contain the particular provision held to be invalid.

8.20 RFP and Proposal Incorporated into Final Contract

This RFP and the successful proposal will be incorporated into the final contract.

8.21 Proposal Amendment

The City will not accept any amendments, revisions, or alterations to proposals after the deadline for proposal submittal unless such is formally requested, in writing, by the City.

8.22 Consultant Participation

The City reserves the right to share with any consultant of its choosing this RFP and proposal responses in order to secure a second opinion. The City may also invite said consultant to participate in the Proposal Evaluation process.

8.23 Warranty

The selected software proposer will warrant that the proposed software will conform in all material respects to the requirements and specifications as stated in this RFP, demonstrated in both the software demonstration and subsequent proof-of-capabilities. Further, those

requirements as stated in this RFP will become part of the selected software Proposer's license and the software Proposer will warrant to the requirements. The selected Proposer must warrant that the content of its proposal accurately reflects the software's capability to satisfy the functional/technological requirements as included in this RFP. Furthermore, the warranty, at a minimum, should be valid for the duration of the implementation and until final acceptance (as will be defined during the negotiation process) of all application modules included in the implementation.

8.24 Rights of the City

The City reserves the right to:

- ◆ Make the selection based on its sole discretion
- ◆ Reject any and all proposals
- ◆ Issue subsequent Requests for Proposals
- ◆ Postpone opening proposals, if necessary, for any reason
- ◆ Remedy errors in the Request for Proposal process
- ◆ Approve or disapprove the use of particular subcontractors
- ◆ Negotiate with any, all, or none of the Proposers
- ◆ Accept other than the lowest offer
- ◆ Waive informalities and irregularities in the proposals
- ◆ Enter into an agreement with another Proposer in the event the originally selected Proposer defaults or fails to execute an agreement with the City

An agreement will not be binding or valid with the City unless and until it is approved by the City Council and executed by authorized representatives of the City and of the Proposer.

8.25 Project Funding

The City of Santee has been awarded a grant under the Senate Bill 2 Planning Grants Program (details may be found at <https://www.hcd.ca.gov/grants-funding/active-funding/planning-grants.shtml>); the procurement of the LMS shall be in part funded by this grant.

APPENDIX A – CITY PROFESSIONAL SERVICES AGREEMENT

It is recognized that the formal basis of any agreement between the City and the service provider is a contract rather than a proposal. In submitting proposals, Proposers must indicate that they are prepared to complete the City's Agreement for Professional Services, which is provided as part of this RFP.

In addition, the selected Proposer will be expected to accommodate the City Insurance Requirements detailed within the City Professional Services Agreement.

The selected Proposer will be expected to accept these terms and conditions unless they otherwise take exception in their cover letter.



Santee Prof Svcs
Agreement (2020)

APPENDIX B – LMS REQUIREMENTS

The Proposer must respond to and submit with their Proposal the LMS Requirements document which has been provided in electronic Word format as an Attachment to this RFP.



Santee LMS
Requirements

APPENDIX C – VENDOR COST WORKSHEET

The Proposer must complete and submit with their Proposal the mandatory cost worksheets which have been provided in electronic Microsoft Excel format as an attachment to this RFP; **the completed file MUST be provided in its native Excel format.**



Vendor Cost
Worksheet

APPENDIX D – CITY-REQUIRED REPORTS & FORMS

REQUIRED REPORTS AT GO-LIVE	
Report Name	Department / Division
Building Permit	Building
Bldg - Review Letter	Building
Notice of Violation CNC Release	Code Compliance
Notice of Violation CNC	Code Compliance
Courtesy Notice - SW	Code Compliance
Courtesy Notice	Code Compliance
Notice of Violation	Code Compliance
Notice of Violation - SW	Code Compliance
Letter - TBD+A32	Code Compliance
Administrative Citation	Code Compliance
Moving Permit	Engineering
ROW Permit - Exhibit B	Engineering
ROW Permit - Exhibit A	Engineering
Construction Inspection	Engineering Inspection
SW Construction Site Inspection Form	Engineering/Storm Water Inspection
Fire - Plan Review Submittal Form	Fire
Fire - Alarm Insp Report	Fire
Fire - Protection System Insp Report	Fire
Fire - Sprinkler Insp Report	Fire
Fire - UG Private Fire Svc Main Insp Report	Fire
Form 112 - Outgoing Letter of Transmittal	Land Development
Form 133 Flood Zone Evaluation Request	Land Development
Form 471 - Grading Permit	Land Development
Form 473 - Encroachment Permit	Land Development
Form 597 - Request for Additional Funds	Land Development
Form 586 - Saturday Work Request	Land Development
Final/Parcel Map Processing	Land Development
Impact Fees Calculator/Invoice	Land Development
Vacation processing	Land Development
Sign Permit	Planning
Temporary Sign Permit	Planning
SW Business Inspection Form	Storm Water
SW Courtesy Notice	Storm Water
TCBMP Inspection Form	Storm Water
SW Admin Citation	Storm Water

REQUIRED REPORTS IF NOT SUPPORTED BY SOFTWARE FUNCTIONALITY	
Report Name	Department / Division
Comment and Condition Memo - all other	All
Haul Permit Conditions	Engineering
Construction Inspection Request	Land Development
General Inter-Office Memo	Land Development
Form 111 - Internal Project Transmittal	Land Development
REQUIRED REPORTS - 3 MONTHS POST GO-LIVE	
Report Name	Department / Division
Notice of Violation - Addition	Code Compliance
Haul Permit Deposit Refund	Engineering
Bond Request Letter	Land Development
Form 134 Flood Zone Evaluation Letter	Land Development
Form 354 - Notification to Developer for Project Acceptance	Land Development
Form 417 - Pre grade meeting agenda	Land Development
Form 577 - Release of Refundable Deposit	Land Development
Form 588 - Release of Grading Bond	Land Development
REQUIRED REPORTS - 6 MONTHS POST GO-LIVE	
Report Name	Department / Division
Form 322 - Faithful Performance Bond - Street Imp	Land Development
Form 323 - Labor and Materials Bond - Street Imp	Land Development
Form 332 - Faithful Performance Bond - Subdivision	Land Development
Form 333 - Labor and Materials Bond - Subdivision	Land Development
Form 337 - Monumentation Cash Security	Land Development
Form 320 - Right of Way Improvement Agreement - Director	Land Development
Form 321 - Right of Way Improvement Agreement - City Manager	Land Development
Form 330 - Subdivision Improvement Agreement - Director	Land Development
Form 331 - Subdivision Improvement Agreement - City Manager	Land Development
Form 406 - Grading Cash Security	Land Development
Form 407 - Grading Bond	Land Development
Form 410 - Agreement to Perform Erosion Control	Land Development
Form 411 - Erosion Control Cash Security	Land Development
Form 412 - Erosion Control Bond	Land Development
Form 576 - Release of Securities	Land Development
Form 615 - Storm Water Maintenance Agreement	Land Development/Storm Water
REQUIRED REPORTS - POST GO-LIVE DATE TBD	
Report Name	Department / Division
Abandon Property Registration	Code Compliance
Form 402 – Grading Permit Bond and Fees Calculator	Land Development
Form 303 – Public Improvements Bond and Fees Calculator	Land Development
GENERIC FORM REQUESTED	
Form Name	Department / Division
Bldg - Inspection Card	Building
Occupancy Certificate	Building

